

SERVICE CENTER COUNCIL **HANDBOOK**

2023-2024



**CALIFORNIA
TEACHERS
ASSOCIATION**

Last revised August 2022

STANDING RULE 4 – 3

1. Handbook. The Board of Directors shall regularly publish a Handbook outlining the duties, powers, responsibilities and funding of CTA Service Center Councils. That Handbook shall be published pursuant to, and have the force and effect of, this Rule. (Amended August 1982, September 1992, January 2002)

2. Rules of Operation. The Board of Directors shall regularly review the rules of operation for each Service Center Council to ensure their compliance with CTA/NEA Policies and Procedures. (Adopted January 2002)

INTRODUCTION

This handbook for CTA Service Center Councils has been developed to provide a single resource to guide and assist CTA Service Center Councils, and particularly their chairpersons, in conducting the Association activities assigned to the CTA Service Center Councils.

The contents have been adopted by the CTA Board of Directors, as drawn from previous working documents, experiences of active Chairperson, advice and counsel of the CTA Executive Officers, Board of Directors and Staff. The Service Center Chairs Council Committee will continuously review this handbook. (*Revised 1/1987, 6/1987, 11/1988, 6/1990, 4/1991, 7/1992, 10/1994, 7/2002, 5/2003, 7/2003, 01/2009, 07/2009, 06/2010, 06/2011, 06/2012, 09/2012, 06/2013, 09/2013, 10/2013, 03/2014, 04/2014, 05/2014, 06/2014, 09/2014, 11/2014, 06/2015, 07/2015, 09/2015, 06/2017, 06/2018, 08/2018, 01/2019, 07/2020, 04/2021, 06/2021, 07/2021, 08/2021, 10/2021, 02/2022, 08/2022*)

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I. ROLE AND FUNCTION OF SERVICE CENTER COUNCIL (SCC)

A. Rules of Operation.

This handbook shall constitute the primary governance document for each SCC. Supplementary Rules of Operation may also be adopted by the SCC, which comply with CTA governance documents and policies. In all other aspects, meetings and elections shall be conducted in accordance with the latest edition of “Roberts Rules of Order.”

B. General Purposes.

This handbook is intended to implement the Bylaws with special regard to performance of the following functions by SCCs:

1. SCC will conduct four meetings a year prior to each meeting of the State Council of Education, and at such other times as it may desire, consistent with the policies of the Association. It is the responsibility of chapter presidents or their designee and State Council representatives to attend these general meetings prior to each State Council.
2. Provide a center for exchange of information and discussion of actions under consideration by the State Council of Education.
3. Serve as a forum and hearing body on issues referred through the CTA governance structure, by Council and/or Board action (i.e., CTA Budget Hearings).
4. Coordination of membership participation in regional CTA activities, including workshops, multi-district Council seat elections, NEA delegate elections, political activities, including recommendation of legislative candidates and legislative contact programs.
5. Assist in the identification of priorities for and evaluation of regional programs and service needs and refer concerns from chapters to the CTA Governance structure.

C. Non-Governance Status.

Service Center Councils shall not be considered to be part of the policymaking and/or governance structure of the Association. All functions and activities of SCC shall be consistent with the principle of direct chapter representation of the State Council of Education through locally elected State Council representatives. SCCs cannot direct how members vote. SCCs shall not endorse candidates for CTA/NEA office because of their non-governance status.

D. Boundaries.

Geographical boundaries of SCCs shall not split State Council areas. A chapter may petition the Board of Directors for a change in SCC boundaries by sending a letter to the CTA president by January 1st. A copy of the letter shall be sent to each of the chairpersons of the affected Service Centers. The request shall be forwarded to the SCC Chairs Committee which will then study the impact of the proposed change, taking into account factors such as finances, geography and representation, and make its recommendation to the Board of Directors by the last State Council meeting of that year. The recommendation shall be forwarded to the Board of Directors for action.

E. Composition.

SCCs shall consist of the following voting members:

1. CTA State Council representatives from the chapters within the geographical boundaries of the SCC and the At-Large State Council representative. The use of alternates is authorized only when such alternates have been authorized to attend and vote at the subsequent State Council meetings.
2. Presidents of chapters, including Higher Education, ESP and SCTA chapters, within the geographical boundaries. The use of alternates, usually the vice president of the chapter, shall be authorized in exceptional cases where the chapter president is unable to personally attend.
3. The elected officers of the SCC are the Chairperson, Vice Chairperson, Secretary and Treasurer. The elections of the SCC officers shall be standardized so that all terms begin June 26th.
4. Members of the CTA and NEA Boards of Directors and CTA/ABC Committee members who represent chapters within the geographical boundaries of the Service Center Council.
5. Chairpersons of Committees.
6. Additional representatives who are active CTA members within geographical boundaries of the SCC, as determined by the SCC within its local Rules of Operation.
7. At-Large ABC Committee members shall be *ex-officio* non-voting members except at their home Service Centers.
8. The CTA/NEA Retired member of State Council, in each region, shall be an *ex-officio*, non-voting member of either the SCC closest to their place of residence or the SCC where they were active.

F. Funding, Accounting, Resources.

1. The CTA Treasurer's Handbook shall be the resource and guide for fiscal questions and activities.
2. As a condition of receiving funding from CTA within scheduled timelines for the coming fiscal year, each SCC shall file with the CTA Secretary-Treasurer on forms provided by the CTA Secretary-Treasurer the following information:
 - a. A preliminary budget showing income and expenditures for the coming year, to be submitted by August 31. The final adopted budget to be submitted within two weeks following the first SCC meeting. (Annual Budget, Appendix A, Form 1).
 - b. A report on the SCC activities for the past fiscal year in membership recruitment; training sessions held, including an evaluation and number of participants at each session; political action; and other appropriate activities. (Activities Report, Appendix A, Form 2) – Due in November

- c. A report of the income and expenditures for the past fiscal year. (Treasurer's Report, Appendix A, Form 3) – Due in November
 - d. A monthly Charges for Services and Supplies form. (SCC Charges for Services and Supplies, Appendix A, Form 4) – Due in March for September through February charges, June for March through May charges, and in September for June through August charges.
 - e. Proof of filing Federal and State tax returns. Proof of filing may include confirmation page from the IRS or Franchise Tax Board (FTB) website upon filing the e-postcards (see examples in Appendix A) or a confirmation letter/email from the SCC's tax professional indicating the dates that the tax returns were filed and accepted by the IRS and FTB.
- Annual tax returns must be filed with the IRS (Federal) and Franchise Tax Board (State) by January 15th following fiscal year end August 31st. Failure to file the information tax returns for three consecutive years will result in the automatic revocation of your tax-exempt status. Consequences of revocation can be significant.
- Refer to CTA Treasurers Handbook for more information on tax return filings.
- f. A two-year review of books and records to be conducted periodically by the Controller's Office on a rotating basis.
3. The following shall be the annual funding schedule effective September 1, 2022:

Report Due to CTA	SCC Form #	Due Date	Funding Percentage
Preliminary or Adopted (preferred) Budget	1	September 30	30%
Prior Year-end Treasurer's Report and Activity Report	2, 3	November 30	20%
Federal and State Tax Returns Proof of Filing *		January 15	30%
Charges for Services and Supplies (September to February)	4	March 31	10%
Charges for Services and Supplies (March to May)	4	June 30	10%

**Note: If proof is not submitted, 100% of SCC funding for FY 2023-2024 will be withheld until paperwork is submitted.*

4. Accounting Procedures for Visiting Officials. Whenever there is a SCC function where the cost of the meal for visiting officials (i.e. leadership from outside the SCC area) are present, the following procedures shall be used:
 - a. The SCC may host the visiting official as the guest of the SCC.

- b. Alternatively, the visitor may choose to pay the meal costs and seek reimbursement through other channels.
- c. If neither of the above applies, the SCC Treasurer, using forms provided by the CTA Secretary-Treasurer, shall add the name of the guest. The CTA form is then transmitted to the CTA Governance Office, where a credit to the SCC ledger is processed, to be included in the next quarterly disbursement check from CTA. (Guest Reimbursement Request, Appendix A, Form 5)
- d. All meal costs for staff shall be processed through the prescribed staff channels by the Regional Manager.

G. CTA Directors.

CTA Directors whose geographical area includes chapters within a given SCC area shall be involved with the CTA program being delivered by the SCC for each such area.

H. Attendance by CTA Executive Officers.

The three elected CTA Executive Officers (President, Vice President, and Secretary-Treasurer) are encouraged by CTA Board policy to visit each SCC on an annual basis, and are expected to do so not less than every two years. SCC Chairpersons are encouraged to extend an invitation to the officers accompanied with a Calendar of Events.

- 1. Purpose. The purpose of these visits is to give reports and receive input on CTA programs and activities.
- 2. Advance Notice. Wherever possible, each Executive Officer shall give 15 days advance notice to the Chairperson of the SCC that they plan to attend. The notice should include the planned arrival time, departure time, and a request for an appropriate amount of time on the agenda.
- 3. Coordination of Calendars. The Executive Officers are expected to coordinate their calendars with one another. If more than one of them happens to be in attendance at a given SCC meeting, the senior officer present is assumed to be one reporting.

I. Areas of Activity.

Using guidelines adopted by the CTA Board of Directors, the following shall be the CTA mandated minimum areas of activity for the SCCs in return for CTA funding:

- 1. Meetings. One SCC and one Steering Committee meeting prior to each State Council meeting.
- 2. CTA Budget Hearings. Each SCC shall provide time at 1st and 4th meetings to conduct surveys and hearing.
- 3. Membership Recruitment.
- 4. Workshop and Training Coordination.
- 5. Political Action and Legislative Activities.
- 6. Candidate Interviews and Recommendations.

7. Negotiations/Coordinated Bargaining.
8. REAC, LGBTQ+ Advocacy Coordinator, Human Rights Advocacy Coordinator, Women's Advocacy Coordinator.
9. Instruction and Professional Development Activities.
10. Service Center Council Awards. A committee shall screen applicants, select recipients and arrange for presentations of awards. Detailed information is provided in the CTA Awards Handbook. (CTA Award Schedule, Appendix B)
11. Delegate Orientation for the NEA Representative Assembly.
12. Other Committees. Other committees, as deemed necessary and pertinent by action of SCC or its Steering Committee should be formed.
13. Discretionary. Traditional areas for expenditures of funds at the discretion of each SCC may include: meals, mileage for participants, overnight housing, miscellaneous officers' expenses, hospitality at Leadership Conferences, guest speaker honoraria and release time when needed for SCC leadership. SCC and Steering Committee meetings other than those in subsection I.1 of this section are considered discretionary. SCC funds provided by CTA shall not be used to support, subsidize, or participate in the activities of any CTA governance affiliate or caucus, except CTA/NEA-Retired and then only with prior approval of the SCC.
14. Additional Funds. Each SCC may generate its own additional funds for its own business matters where appropriate.
15. SCCs are encouraged to support and mentor local Student CTA (SCTA).

J. Staff Liaison.

The CTA Executive Director shall designate staff as appropriate and necessary to provide assistance with the program functions delivered by the SCC. (Charges for Services and Supplies, Appendix A, Form 4)

These staff assignments are to be coordinated by the Assistant Executive Directors/Regional Managers. If there are staff problems/concerns that cannot be resolved at the Assistant Executive Directors/Regional Managers level, the Service Center Chairperson shall address the problems/concerns to the CTA President in a timely fashion in writing. The communication should include, but not be limited to:

- A description of the problem,
- Actions taken,
- The status of the problem at the time of the notice to the CTA President.

The CTA President will confer with the Executive Director on behalf of the Service Center Chairperson who will consult with staff and other appropriate person(s) as deemed necessary.

II. ROLE AND FUNCTION OF STEERING COMMITTEE

A. Composition.

Each SCC Steering Committee shall be composed of elected officers, the State Council At-Large Representative, and any others designated by the Rules of Operation for that SCC.

SCCs with ESP and student CTA chapters are encouraged to have a member from each on the Steering Committee. The SCC Chairperson shall chair the Steering Committee.

Members of the CTA Board of Directors serving one or more chapters of a SCC shall be *ex-officio* voting members of the Steering Committee for each such SCC in their geographical area. Members of the NEA Board of Directors (Seats 1-15) and CTA/ABC Committee, including Higher Ed and At-Large members, serving one or more chapters of a SCC shall be *ex-officio* voting members of their home Service Center and Service Center Steering Committee for each such SCC, but need not be counted in determining the existence of a quorum.

B. Responsibility.

The Steering committee shall coordinate the program of the SCC, including the following:

1. Propose the annual SCC budget for adoption by SCC.
2. Develop the yearly calendar of activities for the SCC.
3. Prepare the agenda for SCC meetings.
4. Review and submit to the CTA Secretary-Treasurer the necessary reports for continuation of CTA funding.
5. Assist the Chairperson in carrying out the mandated Areas of Activity.
6. Coordinate reports on training and activities regarding minority issues.

III. ROLES AND RESPONSIBILITIES OF THE SCC CHAIRS, OFFICERS AND COMMITTEES

The elected officers of the Service Center Council are the chair, vice chair, secretary and treasurer. Elected Service Center officers shall be active members of the Association currently employed by a public education institution.

A. The SCC Chairperson shall:

1. Be responsible for communication and coordinator of SCC involvement in CTA programs and activities.
2. Chair meetings of the SCC Steering Committee.
3. Liaison with State Council representatives and chapter presidents.
4. Encourage active participation of local chapters by communicating regularly with local chapter presidents, State Council representatives and CTA Board members within the geographical boundary.
5. Extend an invitation to the CTA Executive Officers to visit the SCC accompanied with a calendar of events.
6. Attend Regional Leadership Conference and Presidents Conference (including Equity Training).
7. Coordinate the SCC's correspondence, announcements and event arrangements with assigned CTA Staff Consultant(s).

8. Appoint committee chairperson and members and submit for approval to the appropriate body as designated by the local Rules of Operation. The SCC Chair is an *ex-officio* member of all committees and the SCC Equity Team.
 9. Work with committee(s) to carry out CTA-mandated programs.
 10. Shall be familiar with the following to assist in elections:
 - a. Local SCC Rules of Operation
 - b. CTA Elections Manual
 - c. CTA Organizational Handbook
 - d. Representation Report
- B.** The Vice-Chair shall:
1. Serve as assistant to the Chairperson in all duties of the Chairperson;
 2. Assume the duties of the Chairperson in the absence of the Chairperson;
 3. Attend meetings in place of the Chairperson wherever necessary and appropriate.
- C.** The Secretary shall:
1. Keep a careful and accurate record of the proceedings of each meeting, regular or special, of the Service Center Council;
 2. Be responsible for the distribution of minutes, notice of meetings, and agendas for all meetings to members of the Service Center Council;
 3. Keep an accurate roster of the membership of the SCC and of all committees; and
 4. Carry on the correspondence pertaining to the affairs of the SCC as directed by the Chairperson.
- D.** The Treasurer shall:
1. Receive all funds belonging to the Association and be responsible for their safekeeping and accounting;
 2. Pay out such funds upon orders of the Chairperson;
 3. Shall meet at least quarterly with SCC Chairperson to review financial records and accounts; (See #7 below)
 4. Provide a written financial report for each regular meeting of the Steering Committee and the Service Center Council;
 5. Be responsible for an annual audit of the books of the SCC and distributing a summary of this audit to the membership; and
 6. Be responsible for submitting membership and financial reports to the CTA, NEA, and other local agencies as required by law.
 7. Maintain the “Activity Sheet” on an ongoing basis.
 8. Shall prepare financial records and accounts as follows:

Fall Quarter:

1. Year-End Treasurer's Report (September 1 – August 31)
2. Activity Report (September 1 – August 31)
3. June – August Bank Reconciliations

Winter Quarter:

1. IRS Information Return – IRS Form 990-EZ or e-postcard due to be filed by January 15
2. FTB Form 199 or e-postcard due to be filed by January 15
3. IRS Form 1099s (if applicable) due to recipients by January 31
4. IRS Form 1096 (if applicable) due to IRS along with copies of IRS Form 1099s by February 28
5. September – November Bank Reconciliations

Note: IRS Form 1099s are based on a calendar year earnings of \$600 or more.

Spring Quarter:

1. Mid-Year (as of February 28) Treasurer's Report (should include 80% CTA Funding)
2. Mid-Year (as of February 28) budget to actual variance analysis
3. December – February Bank Reconciliations

Summer Quarter:

1. Proposed Budget (September 1 – August 31)
2. March – May Bank Reconciliations

9. Shall be responsible for use and maintenance of credit cards. Debit card use by Service Center Councils is prohibited.

- E.** Any SCC officer who fails to carry out their respective duties as listed in Article III, Sections A-D can be removed by a unanimous vote of the remaining SCC officers and CTA Board of Directors serving on the Steering Committee. Such action will only be taken after a thorough investigation and reasonable attempts to remedy the problem. The removed officer can appeal this action to the entire Steering Committee. The Steering Committee action can be appealed to the CTA Board of Directors.
- F.** A SCC officer shall be removed from financial authority and responsibilities (check signing, credit cards, online banking, etc.) upon confirmation of a misappropriate use of funds occurring in any leadership role. Said officer shall resign from office.
- G.** A vacancy shall exist in the case of death, resignation, or inability to serve on the committee. If there is a vacancy occurring in the office of the Chair, the Vice-Chair shall assume the office. In the event a vacancy occurs in the other offices, a special election shall be held at the next regularly scheduled Service Center Council meeting to elect successors to fill the unexpired terms. (CTA Bylaws, Article VI, section 5)

IV. CTA SERVICE CENTER COUNCIL CHAIRS COMMITTEE

- A.** Meeting dates and places of this committee are determined by the CTA Board of Directors.
- B.** All SCC Chairs are expected to attend State Council Committee meetings.
- C.** Those chairpersons who are not members of State Council should usually choose the Council Committee with the least representation from their particular SCC area.

- D.** SCC Chairs are expected to attend the general sessions of the State Council.
- E.** Directorial District Sunday Breakfast Caucuses at State Council are chaired by the CTA Board Member and should also be attended by the SCC Chairperson(s).
- F.** The Committee Chairperson, Vice Chairperson, and the Recording Secretary are elected by the SCC Chairs Committee at the last State Council meeting for each year. Duties of these officials are as follows:
 - 1. Functions of the Chairperson include:
 - a. Preside over all meetings of the SCC Chairs Committee.
 - b. Serve as liaison with the CTA Executive Officers, Board of Directors, State Council Committee and appropriate staff.
 - c. Ensure availability of appropriate Committee materials for each meeting.
 - 2. Duties of the Vice Chairperson include:
 - a. Preside over meetings of the SCC Chairs Committee in the absence of the Chairperson.
 - b. Attend meetings in place of the Chairperson wherever necessary and appropriate.
 - 3. Duties of the Recording Secretary include:
 - a. Keep accurate records of the proceedings of all meetings.
 - b. Forward a draft of such minutes to appropriate staff in a timely manner.
- G.** A vacancy shall exist in the case of death, resignation, or inability to serve on the committee. If there is a vacancy occurring in the office of the Chair, the Vice-Chair shall assume the office. In the event a vacancy occurs in the other offices, a special election shall be held to elect successors to fill the unexpired terms. (CTA Bylaws, Article VI, section 5)

V. ELECTIONS

- A.** Please check the current CTA Elections Manual for most up-to-date elections procedures.
- B.** Elections Committee.
 - 1. An Elections Committee consisting of a minimum of three members should be appointed.
 - 2. The Elections Committee shall be appointed and functioning by the second State Council meeting of the year.
 - 3. Committee members may vary with the election in question.
- C.** The CTA Election Committee will conduct the following elections:
 - 1. NEA State Delegate seats, which shall be considered “At-Large” unless otherwise allocated;
 - 2. Multiple Chapter State Council Representative and Alternates;
 - 3. Service Center Council At-Large Representatives and Alternates.

The Service Center Council Elections Committee shall be responsible for conducting internal Service Center Council Steering Committee and Officer elections.

D. Statewide CTA/NEA Elections.

1. A list of SCC meeting dates and names and addresses of SCC Chairs shall be provided by the Governance Department to each candidate who files a declaration of candidacy for statewide office. It shall be the responsibility of the candidate to contact the SCC Chair to request time on the SCC meeting agenda the day before the meeting.
2. In an election year, each SCC will provide time for campaign speeches when requested. The order of the campaign speeches shall be determined by using the CTA alphabet and the candidates' last names. Each candidate or designee will be allowed five (5) minutes for a speech. The agenda shall also include a question-and-answer period after all speeches, not to exceed ten (10) minutes. For the purposes of this section, "statewide officers" are:
 - a) CTA President
 - b) CTA Vice President
 - c) CTA Secretary-Treasurer
 - d) CTA Director
 - e) CTA/ABC Committee Member
 - f) CTA/NEA Coordinating Director
 - g) NEA Director
 - h) NEA Alternate Director
3. Any visit by a candidate to an SCC for the purpose of campaigning shall be reported as a campaign expense.

E. State Council At-Large Elections.

Candidates shall be given an opportunity to address the members of the SCC at a business meeting prior to conducting the election. Special elections are exempt.

VI. STATE COUNCIL AT-LARGE

The State Council At-Large is responsible for active participation in the Service Center, CTA programs and activities, including:

- A.** Participate and attend scheduled Steering Committee and Service Center meetings.
- B.** Report at each Steering and SCC meeting.
- C.** Present information pertaining to Black, Indigenous and People of Color (BIPOC) members.
- D.** Attend conferences that will enhance their knowledge of BIPOC members issues.
- E.** Assist SCC in recruitment of BIPOC members to fully participate at the Service Center level, CTA, and National Education Association Representative Assembly through a variety of activities such as but not limited to reception and trainings.
- F.** Develop a system for cultivating, building and sustaining relationships with local chapter leaders and community-based organizations whose focus is on BIPOC issues.

VII. SERVICE CENTER COUNCIL EQUITY TEAM

- A.** The SCC Equity Team is composed of the SCC Human Rights Advocacy Coordinator, the SCC Women's Advocacy Coordinator, SCC LGBTQ+ Advocacy Coordinator and the State Council At-Large and others as described in the SCC Rules of Operations. (SCC Equity Team Job Descriptions, Appendix C). The Equity Team shall develop a SCC Equity Action Plan. The State Council At-Large shall be the Chair of the Equity Team.
- B.** The SCC At-Large member will recommend appointments for the Equity Team positions (Human Rights Advocacy Coordinator, Women's Advocacy Coordinator, LGBTQ+ Advocacy Coordinator) to the SCC Steering Committee, once a quorum is met. All appointments will commence on the first day of the Equity Team Planning Meeting. When there is a vacancy, the At-Large Member will appoint an active member within the SCC to serve in the interim. All interim positions should be considered recommendations, which must be approved by vote during the next Steering Committee meeting that immediately follows the interim appointment.
- C.** The Equity Team shall be funded to attend the Equity Team Training for the Service Center Council Equity Teams.
- D.** The Equity Team shall be funded to attend the CTA Equity and Human Rights Conference Equity Team Breakfast. Service Centers will incur the cost of travel, transportation, lodging, meals not provided and other incidentals. CTA shall waive the conference registration fee for members of the Equity Team.

VIII. SERVICE CENTER COUNCIL RACIAL EQUITY AFFAIRS COMMITTEE (REAC; formerly EMAC)

A. Composition.

All of CTA's recognized Black, Indigenous and People of Color (BIPOC) caucus groups shall be represented. The recognized caucuses are:

1. African American
2. American Indian/Alaska Native
3. Hispanic
4. Pacific Asian American

The State Council At-Large Representative shall have a seat on the committee and represent the committee on the SCC Equity Team. Service Center Chairs shall appoint in consultation with the SCC At-Large Representative, CTA geographical Director(s) and CTA At-Large Director(s) a minimum of four emerging leaders/members to REAC.

B. Purpose.

The purpose of the Committee is to work toward an Association that is ethnically balanced, all inclusive, and involves and empowers equity-minded members. The work of the committee shall include:

1. Monitoring BIPOC member representation within the Service Centers and its locals;
2. Providing additional BIPOC member input on Service Center programs and activities;
3. Making specific recommendations to the SCC for continuing BIPOC member input and involvement at each level of the Associations;
4. Promoting the needs of the Council's diverse student population;

5. Developing activities that will assist in the recruitment and retention of BIPOC member teachers;
6. Assessing the needs of BIPOC teachers using a variety of approaches in order to identify issues;
7. Identifying community-based organizations that work on issues related to BIPOC;
8. Promoting BIPOC member involvement in local chapters;
9. Promoting BIPOC member attendance at CTA/NEA conferences and trainings;
10. Monitoring and promoting BIPOC member participation at the NEA Representative Assembly as well as at the local and State Council levels;
11. Promoting BIPOC member involvement in political activities;
12. Any other work that promotes a more inclusive and diverse CTA.

C. Chairperson.

In appointing chairs of REAC, the SCC Chair is encouraged to follow the BIPOC rotation used by the CTA REAC Committee.

D. Meetings.

Meetings shall be held prior to SCC meetings.

E. Committee Rules of Operation.

The Committee shall operate under the rules of consensus to reach agreement on all business of the committee. REAC shall follow the Service Center Rules of Operation for committees.

F. Funding.

- Service Centers shall fund the REAC Co-Chairs to the CTA Equity and Human Rights Conference.
- Service Centers shall fund the REAC Co-Chairs to attend the Organizational Meeting of the State REAC and SCC Equity Team.

IX. SERVICE CENTER SUPPORT - SCTA

SCCs are encouraged to support and mentor local Student CTA (SCTA). Support may include sending SCTA members to CTA conferences (Regional, Good Teaching, Equity and Human Rights). SCC funds shall not be used to provide funding for NEA conferences or out-of-state conferences.

APPENDIX A

Sample of Service Center Council Financial Forms

SCC Form #1	Annual Budget
SCC Form #2	Activities Report
SCC Form #3	Treasurer's Report
SCC Form #4	Charges for Services and Supplies
SCC Form #5	Guest Reimbursement Request

Sample Proof of Tax Filings: 990-N and 199-N e-Postcards

SERVICE CENTER COUNCIL: _____
 ANNUAL BUDGET
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

Beginning Cash Balance

**ANNUAL
BUDGET**

REVENUE:

0120 Funding from CTA

0140 Interest

0150 Special Assessments

0160 Other Revenue

Total Revenue

EXPENSES:

0200 Steering Committee - Article II-B

0210 Meals

0220 Lodging

0230 Travel

0240 Other Steering Committee Expenses

_____ Other _____

Total Steering Committee

0300 Council Meetings - Article I-B

0310 Meals

0320 Lodging

0330 Travel

0340 Other Council Expenses

_____ Other _____

Total Council Expenses Meetings

SERVICE CENTER COUNCIL: _____
 ANNUAL BUDGET
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

**ANNUAL
BUDGET**

EXPENSES (Continued):

0400 Chairperson's Expenses - Article III-A

0410 Meals

0420 Travel

0430 Lodging

0440 Release Time

0450 Other Chairperson's Expenses

_____ Other _____

Total Chairperson's Expenses

0500 Executive Committee - Articles III-A through III-D

0510 Meals

0520 Travel

0530 Lodging

0540 Other Executive Committee Expenses

_____ Other _____

Total Executive Committee

0600 Political/Legislative

0605 Candidate Assessment/Endorsement

0610 Political Legislative Training

0615 Travel

0620 Legislative Liaison

0625 School Board Events

0630 Special Activities

0635 Summer Institute - Political Action

0640 Other Political/Legislative Expenses

_____ Other _____

Total Political/Legislative Expenses

SERVICE CENTER COUNCIL: _____
 ANNUAL BUDGET
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

**ANNUAL
BUDGET**

EXPENSES (Continued):

0650 Other Committees

0655 Awards

0660 Bargaining

0675 Human Rights

0680 Instruction & Professional Development

0685 Other Committees

0690 Presidents Conference

0693 REAC

0695 Retirement

0699 Other Committee Expenses

_____ Other _____

Total Other Committee Expenses

0700 Conferences and Workshops

0710 Bargaining Training

0715 Equity and Human Rights Conference

0717 LGBTQIA Issues Conference

0720 Good Teaching Conference

0725 Grievances

0733 Issues Conference

0735 Membership

0740 NEA - RA

0745 NEA Leadership Summit

SERVICE CENTER COUNCIL: _____
 ANNUAL BUDGET
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

**ANNUAL
BUDGET**

EXPENSES (Continued):

0700 Conferences and Workshops (Continued)

0747 Presidents Conference

0750 Regional Conference

0760 SCC Conference

0765 Summer Institute

0770 Training and Leadership Development

0785 Other Conferences and Workshops

_____ Other _____

Total Conferences & Workshops

0800 Communications

0810 Newsletters/Bulletins

0820 Political/Legislative

0830 WHO Awards

0840 Other Communications

_____ Other _____

Total Communications

0900 Other Expenses

0910 Community Engagement

0920 Contingency

0930 Crisis Assistance

0950 Equipment

0980 Other Expenses

Total Other Expenses

SERVICE CENTER COUNCIL: _____
 ANNUAL BUDGET
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

ANNUAL BUDGET

EXPENSES (Continued):

1000 General Administration Office Expenses

1010 Telephone

1020 Postage

1030 Supplies

1040 Printing/Duplicating

1050 Occupancy

1060 Temporary Services

1070 Miscellaneous

Total General Admin & Office Expenses

Total Expenses

Ending Cash Balance

(Rev. 07-21)



1. ACTIVITY SHEET

SERVICE CENTER COUNCIL: _____ 2. YEAR ENDING: _____

3. ACTIVITY	4. PLACE/TIME/DATE	5. STAFF	6. # ATTENDING	7. COSTS	8. REMARKS

9. SERVICE CENTER COUNCIL: _____

10. YEAR ENDING: _____

11. OTHER COSTS	12. AMOUNT		

13. Prepared By: _____

Recap of Expenses:

14. Activities Total: \$ _____

15. Other Costs: _____

16. Total Expenses This Year: \$ =====

The “Activity Sheet” is a chronological journal of the Service Center Council’s activity for the previous year. The SCC treasurer should update the activity report on an on-going basis by recording each activity, place, time and date, staff attending, number of members attending, cost of the activity, miscellaneous remarks and other (non-activity) costs incurred during the fiscal year. At the end of the fiscal year, the SCC Treasurer should sum the cost of the year’s activities and list it as the “Activities Total”. The sum of the “Activities Total” and the “Other Costs” should agree with the “Total Expenses” on your end-of year financial report. The SCC Treasurer is required to submit both the “Activity Report” along with the “End-of-Year Financial Report” to the CTA Treasurer in order to receive your second increment of funding (40 percent) in November.

Listed below are the general instructions for completing the SCC budget form.

1. Service Center Council Name.
2. Being an affiliate of CTA, the fiscal year end is 8/31/XX.
3. Activity/Event
4. Place, Time and Date of Activity.
5. Staff attending.
6. Number of members attending.
7. Cost of Activity.
8. Comments.
9. Service Center Council Name.
10. Being an affiliate of CTA, the fiscal year end is 8/31/XX.
11. Other non activity costs incurred by the Service Center Council.
12. Amount of other non activity costs.
13. Person completing the SCC Activity Form.
14. Sum of Activity Costs from column 7.
15. Sum of Other Costs from column 12.
16. Sum of Activity Costs and Other Costs. Should agree with Financial Report.

SERVICE CENTER COUNCIL: _____
 TREASURER'S REPORT
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

ANNUAL BUDGET	ACTUAL	VARIANCE
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Beginning Cash Balance

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REVENUE:

0120 Funding from CTA

0140 Interest

0150 Special Assessments

0160 Other Revenue

Total Revenue

EXPENSES:

0200 Steering Committee - Article I-B

0210 Meals

0220 Lodging

0230 Travel

0240 Other Steering Committee Expenses

_____ Other _____

Total Steering Committee

0300 Council Meeting - Article I-B

0310 Meals

0320 Lodging

0330 Travel

0340 Other Council Expenses

_____ Other _____

Total Council Meetings

SERVICE CENTER COUNCIL: _____
 TREASURER'S REPORT
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

ANNUAL BUDGET	ACTUAL	VARIANCE
------------------	--------	----------

EXPENSES (Continued):

0400 Chairperson's Expenses - Article III-A

0410 Meals

0420 Travel

0430 Lodging

0440 Release Time

0450 Other Chairperson's Expenses

_____ Other _____

Total Chairperson's Expenses

0500 Executive Committee - Article IV-A through III-D

0510 Meals

0520 Travel

0530 Lodging

0540 Other Executive Committee Expenses

_____ Other _____

Total Executive Committee

0600 Political/Legislative

0605 Candidate Assessment/Endorsement

0610 Political Legislative Training

0615 Travel

0620 Legislative Liaison

0625 School Board Events

0630 Special Activities

0635 Summer Institute - Political Action

0640 Other Political/Legislative Expenses

_____ Other _____

Total Political/Legislative Expenses

SERVICE CENTER COUNCIL: _____
 TREASURER'S REPORT
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

ANNUAL BUDGET	ACTUAL	VARIANCE
------------------	--------	----------

EXPENSES (Continued):

0650 Other Committees

0655 Awards

0660 Bargaining

0670 Elections

0675 Human Rights

0680 Instruction & Professional Development

0685 Other Committees

0690 Presidents Conference

0693 REAC

0695 Retirement

0699 Other Committee Expenses

_____ Other _____

Total Other Committee Expenses

0700 Conferences and Workshops

0710 Bargaining Training

0715 Equity and Human Rights Conference

0717 GLBT Issues Conference

0720 Good Teaching Conference

0725 Grievances

0733 Issues Conference

0735 Membership

0740 NEA - RA

0745 NEA - Leadership Summit

SERVICE CENTER COUNCIL: _____
 TREASURER'S REPORT
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

ANNUAL BUDGET	ACTUAL	VARIANCE
------------------	--------	----------

EXPENSES (Continued):

0700 Conferences and Workshops (Continued)

0747 Presidents Conference

0750 Regional Conference

0760 SCC Conference

0765 Summer Institute

0770 Training and Leadership Development

0785 Other Conferences and Workshops

_____ Other _____

Total Conferences & Workshops

0800 Communications

0810 Newsletters/Bulletins

0820 Political/Legislative

0830 WHO Awards

0840 Other Communications

_____ Other _____

Total Communications

0900 Other Expenses

0910 Community Engagement

0920 Contingency

0930 Crisis Assistance

0950 Equipment

0980 Other Expenses

Total Other Expenses

SERVICE CENTER COUNCIL: _____
 TREASURER'S REPORT
 FOR THE FISCAL YEAR ENDED AUGUST 31, _____

ANNUAL BUDGET	ACTUAL	VARIANCE
------------------	--------	----------

EXPENSES (Continued):

1000 General Administration Office Expenses

1010 Telephone

1020 Postage

1030 Supplies

1040 Printing/Duplicating

1050 Occupancy

1060 Temporary Services

1070 Miscellaneous

Total General Admin & Office Expenses

Total Expenses

Ending Cash Balance

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(Rev. 07-21)



CALIFORNIA TEACHERS ASSOCIATION
Service Center Council
Charges for Services and Supplies

Council Name _____ Date _____

Address _____

Month _____

Authorized by Chairperson or Treasurer _____

Signature _____ Date _____

Charges Verified by Consulting Staff _____

Signature _____ Date _____

Payment by: ☐ Check (attached) ☐ Deduct from Next Remittance

DATE	PURPOSE	ITEM/SERVICE USED	CHARGE

TOTAL CHARGES _____

The SCC Charges For Services and Supplies form is used to record on a monthly basis the office expenses (i.e. postage, copying, printing, etc.) incurred by the Service Center Council at the Regional Resource Center office. The purpose of this form is to charge back the SCC for its use of RRC resources. In order to reimburse the RRC, the SCC can either submit a check with its monthly statement covering these costs or instruct the Accounting Department to deduct the stated charges from the next remittance. If the Service Center Council has no charges for services and supplies for a particular month, the SCC treasurer should still send the form with total charges equal to zero to the Accounting Department to insure the continuance of its final funding for the applicable fiscal year. Please note that State Council, NEA RA and ESP election costs are absorbed by the CTA and should be recorded on the SCC Election Reimbursement Form and not the SCC Charges For Services and Supplies form.

Listed below are the general instructions for completing the SCC Charges For Services and Supplies form.

1. List the Name of the Council and Date.
2. List the address of the council.
3. List the month covered.
4. Check the applicable box to indicate whether the SCC is reimbursing the CTA for its use of the RRC office services and supplies or instructing the Accounting Department to deduct these total charges from the next remittance.
5. List the Date, Purpose, Item/Service Used and Charge.
6. Sum the total charges.
7. Signature of authorized Chairperson or Treasurer and Date signed.
8. Signature of Consulting Staff and Date signed.



SERVICE CENTER COUNCIL
GUEST REIMBURSEMENT REQUEST

TO: CTA Accounting Office

FROM: _____
(Name of Service Center Council)

On _____, the following guests other than regular voting members attended a Service Center Council meeting
(Date of Meeting) or function were provided a dinner.

(Signature of SCC Officer)

(Title)

Print Name of CTA Elected Leader or Other Official	Title	Remarks	Cost
Approved for Payment: _____ CTA Governance Office Date			Total

Print Name of CTA Employee	Title	Remarks	Cost
Approved for Payment: _____ Regional Manager Date			Total

Print Name of ABC Elected Leader or Other Official	Title	Remarks	Cost
Approved for Payment: _____ Governmental Relations Manager Date			Total

Grand Total



The SCC Guest Reimbursement form is designed to reimburse the Service Center Council for the cost of dinners the SCC provided to CTA staff and/or leadership.

Listed below are the general instructions for completing the SCC Guest Reimbursement form.

1. List Name of Service Center Council.
2. Date of Meeting.
3. Signature of the Chairperson or Treasurer.
4. Print Names, Titles, Individual Dinner Costs and Total Dinner Costs of the CTA Elected Leadership who attended the SCC meeting. These dinner costs are to be approved by the Governance Manager.
5. Print Names, Titles, Individual Dinner Costs and Total Dinner Costs of the Regional Staff who attended the SCC meeting. These dinner costs are to be approved by the Regional Manager.
6. Print Names, Titles, Individual Dinner Costs and Total Dinner Costs for the ABC Elected Leadership who attended the SCC meeting. These dinner costs are to be approved by the Governmental Relations Manager.
7. Sum the three departmental costs and include that total as the "Grand Total".
8. Send the completed form to CTA Accounting office. Reimbursement will be processed after CTA Accounting office obtains necessary approvals.

Department of the Treasury
Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2020

Open to Public Inspection

A For the **2020** Calendar year, or tax year beginning **2020-09-01** and ending **2021-08-31****B** Check if available☐ Terminated for Business☒ Gross receipts are normally \$50,000 or less**C** Name of Organization:

ASSOCIATION

D Employee Identification

Number

E Website:**F** Name of Principal Officer:

Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

Note: This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

990-N e-Postcard filed with IRS



Confirmation

Print this page for your records. The Confirmation Number below is proof that you successfully filed your 199N e-Postcard.

We received your 199N e-Postcard on 11/15/2021 5:35:59 PM.

Confirmation Number: 801772831907

Entity ID:

Entity Name:

[REDACTED]

Account Period Information

Account Period Beginning: 9/1/2020

Account Period Ending: 8/31/2021

This is not your entity's first year in business.

Your entity has not terminated or gone out of business.

Your entity has not changed the account period.

Gross Receipts: \$47771

This is not an amended return.

An IRS Form 1023/1024 is not pending.

Entity Information

FEIN:

Doing Business As:

Website Address:

Entity's Mailing Address

[REDACTED]

[REDACTED]

Principal Officer's Information

[REDACTED]

Contact Information

Name:

Phone:

[REDACTED]

After we process your 199N e-Postcard, you may receive a bill if the three year [gross receipt average](#) is greater than the amount allowed for filing a 199N e-Postcard.

Print

Log Out

APPENDIX B

CTA Awards Schedule

CTA AWARDS SCHEDULE

AWARD	APPROXIMATE DUE DATE
Communications Awards	Mid-September
State Gold Award	December
Ted Bass Teacher-In-Politics	December / January
Joyce Fadem Chapter-In-Politics	December / January
Human Rights Awards	December / January
John Swett Awards	February / March
State WHO Awards	April / May

Check the *CTA Organizational Handbook* for descriptions of the awards.

These due dates are only approximations. Refer to the announcement letters for the actual deadlines.

APPENDIX C

SCC Equity Team Job Descriptions

SCC Human Rights Advocacy Coordinator

SCC Women's Advocacy Coordinator

SCC LGBTQ+ Advocacy Coordinator

State Council At-Large

California Teachers Association
Human Rights Advocacy Coordinator
Job Description

Responsibilities may include:

- Participate on the Chapter Representative/Executive Council.
- Monitor implementation of Chapter human rights goals and objectives.
- Participate in Association training programs in human rights areas.
- Encourage members to participate in the LGBTQ+ Guy DeRosa Safety in Schools Grant and Scholarship Program, CTA Scholarship Program, Martin Luther King, Jr. Memorial Scholarship Fund, and the César Chávez Memorial Education Awards Program through support of the Institute for Teaching.
- Raise the awareness of the Association to human and civil rights issues as well as community outreach issues.
- Offer leadership in the development of human rights programs in the Association and in the educational profession.
- Monitor the involvement and participation of a broad segment of the membership (including minorities) in the policy-making process and in all practical operations at all levels of the Association.
- Identify and analyze human rights problem areas within the schools and community.
- Provide ongoing and continuous multicultural training for staff, Association leaders and members.
- Work to include language in the local contract protecting civil and professional rights.

California Teachers Association
Women's Advocacy Coordinator
Job Description

Responsibilities may include:

- Participate on the Chapter Representative/Executive Council.
- Monitor implementation of Chapter women's affairs goals and objectives.
- Participate in Association training programs in areas of women's issues.
- Encourage members to participate in the LGBTQ+ Guy DeRosa Safety in Schools Grant and Scholarship Program, CTA Scholarship Program, Martin Luther King, Jr. Memorial Scholarship Fund and the César Chávez Memorial Education Awards Program through support of the Institute for Teaching.
- Raise the awareness of the Association in respect to women's and community outreach issues.
- Offer leadership in the development of women's issues programs in the Association and in the educational profession.
- Monitor the involvement and participation of a broad segment of the membership (including minorities) in the policy-making process and in all practical operations at all levels of the Association.
- Identify, analyze, and provide resources as they relate to women's issues within the schools, chapter and community.
- Provide ongoing and continuous multicultural training for staff, Association leaders and members that address women's issues.
- Work to include language in the local contract protecting civil and professional rights as they pertain to women's issues.

California Teachers Association
LGBTQ+ Advocacy Coordinator
Job Description

Responsibilities may include:

- Monitor implementation of Federal and California laws, CTA, Chapter and Service Center goals and objectives as it applies to gay, lesbian, bisexual, and transgender students and members.
- Participate in the Chapter Executive Board or Service Center Council.
- Participate in Association Human Rights and LGBTQ+ training programs.
- Encourage members to participate in the CTA Guy DeRosa LGBTQ+ Grant and Scholarship Program, Martin Luther King, Jr. Memorial Scholarship Fund, César Chávez Memorial Education Awards Program and the CTA Human Rights Awards.
- Raise the awareness of the Association to issues and concerns affecting LGBTQ+ members and youth.
- Offer leadership in the development of LGBTQ+ programs in the Association and in school districts.
- Monitor and encourage the involvement and participation of LGBTQ+ members in the policy-making process and in all practical operations at all levels of the Association.
- Identify and analyze LGBTQ+ concerns within the schools and community and report these concerns to the Association.
- Participate in professional development committees within CTA and in school districts to provide ongoing and continuous opportunities for LGBTQ+ and Unconscious Bias training for staff, Association leaders and members.
- Work to include language in the local bargaining contracts, protecting civil and professional rights of LGBTQ+ members.
- Provide perspectives of LGBTQ+ youth considerations in “Student First” conversations.

California Teachers Association At-Large Job Description

Responsibilities include:

The State Council At-Large is responsible for active participation in the Service Center, CTA programs and activities, including:

- Participate and attend scheduled Steering Committee and Service Center meetings.
- Report at each Steering and SCC meeting.
- Present information pertaining to Black, Indigenous and People of Color (BIPOC) members.
- Attend conferences that will enhance their knowledge of BIPOC members' issues.
- Assist SCC in recruitment of BIPOC members to fully participate at the Service Center level, CTA, and National Education Association Representative Assembly through a variety of activities such as but not limited to receptions and trainings.
- Develop a system for cultivating, building and sustaining relationships with local chapter leaders and community-based organizations whose focus is on BIPOC issues.

APPENDIX D

SCC Equity Team Funding

Equity Team Planning (President's Conference)

CTA will:

- Reimburse lodging (one night ONLY) at double occupancy rate (*if assistance with a roommate is needed, contact the Human Rights Department Associate Staff*)
- Provide Day one lunch; Day two breakfast and boxed lunch

Service Center Council will cover:

- Travel expenses
- Meals: Day one dinner
- Incidentals as per the Member Expense Statement (MES)
- Can choose to provide a single room by covering the other half of the room

Equity & Human Rights Conference

CTA will:

- Waive registration fee
- Provide breakfast on Saturday during Equity Team Meeting

SCC will be responsible for:

- Travel / Transportation
- Lodging
- Any meals not provided
- Incidentals

CTA HEADQUARTERS

**1705 Murchison Dr.
Burlingame, CA 94010**

<https://www.cta.org/leader-resources/organization-documents>



**CALIFORNIA
TEACHERS
ASSOCIATION**



nea NATIONAL
EDUCATION
ASSOCIATION